

CONTACT SHEET FOR LEA/SFA

LEA/SFA:		Date:
Address of Central Office:		
Superintendent/Administrator:		
Food Service Representative:		Telephone Number:
Check [✓] where each of the following activities occurs, if applicable:	LEA/SFA	School
Application Approval		
Applications Maintained		
Direct Certification		
Direct Certification Records Maintained		
Verification Conducted		
Verification Summary Records Maintained		
Menu Planning		
Edit Checks		
Claims Submitted to State Agency		
Provision 2 and/or 3 Claim Calculation Information		

Entrance Conference	Exit Conference
Date: Location: Names /Titles of Attendees: Comments:	Date: Location: Names/Titles of Attendees: Comments:

SCHOOL SELECTION WORKSHEET

LEA/SFA:	Month:
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Is the State agency conducting performance-based reimbursement certification procedures for this SFA? If yes, ensure schools selected for review represent all meal types served in the SFA. Refer to SP 54-2014, "Administrative Review and Certification for Performance-Based Reimbursement in SY 2014-2015 for more information.

[illegible]

* For Provision 1, 2 or 3, use current year data

INSTRUCTIONS FOR O-2

SCHOOL SELECTION WORKSHEET

Enter the name of the **LEA/SFA**.

Record the **month** used in collecting data for school selection.

- COLUMN A.** Indicate the type of school, E - Elementary (serving lunches to any grade pre-school through 8), S - Secondary (serving lunches to any grade 9 through 12) or C - Combination (serving lunches to any combination of elementary and secondary grades).
- B. List the names of all of the schools in the LEA/SFA participating in the NSLP. To complete the school selection process for year round multi-track schools, use the Optional Form O-2a, O-2b, or O-2c.
- C. For Provision 1, 2 or 3 schools only:
Indicate the Provision type, 1, 2, or 3;
Check [✓] if for breakfast (SBP) only;
Check [✓] if for lunch (NSLP) only; or
Check both [✓] SBP and NSLP if the provision is used for both meal services
- D. Record the number of serving days for each school for the month selected.
- E. Enter the highest number of free eligible for each school. To determine number free eligible for Provision 2 or 3, take the base year number of free eligible students times the percentage change in enrollment to arrive at current year number of free eligible students. To calculate percentage change in enrollment, subtract the base year number of students with access to the NSLP from the current year number of students with access to the NSLP. Divide the result by the base year number and carry to three decimal places, then multiply by 100 to convert to a percentage. For multi-track year round schools, complete O-2a, O-2b, or O-2c to determine the number of free eligible students to enter into column E.
- F. Enter the number of free lunches claimed for the month selected.
- G. Calculate free ADP by dividing the number free claimed (F) by the number of serving days (D). Round the ADP to the nearest whole number.
- H. Calculate the percent free participation by dividing the free ADP (G) by the number free eligible (E). Round to three (3) decimal places and multiply the result by 100 to convert to a percentage.
- I. Indicate the reason for selecting the schools for review.

Determine the minimum number of schools to review using the table below.

Number of Schools in the LEA/SFA	Minimum Number of Schools to Review	Number of Schools in the LEA/SFA	Minimum Number of Schools to Review
1 to 5	1	41 to 60	6
6 to 10	2	61 to 80	8
11 to 20	3	81 to 100	10
21 to 40	4	101 or more	12*
* 12 plus 5 percent of the number of schools over 100. Fractions must be rounded to the nearest whole number.			

All schools with a free average daily participation of 100 (column G) or more and a free participation factor of 100 percent (column H) or more must be reviewed.

Selection of additional schools to meet the minimum number of schools to review must be based on the following criteria:

Elementary schools with a free ADP of 100 or more and percent free participation of 97% or more;
Combination schools with a free ADP of 100 or more and a percent free participation of 87% or more; and
Secondary schools with a free ADP of 100 or more and a percent free participation of 77% or more.

If the minimum number is not met, the State agency must select the remaining schools based on its criteria. These criteria may include:

- Provision 2/3 schools in their base year
- low participation schools
- recommendations from a food service director
- large changes in free lunch counts
- findings from the on-site visits or the claims review process
- any school in which the daily lunch counts appear questionable
- identical or very similar claiming patterns

September 1, 2014

MULTI-TRACK SCHOOL SELECTION WORKSHEET
ACTUAL FREE APPROVED BY TRACK

A. SCHOOL NAME	B. TRACK	C. NUMBER APPROVED FREE	D. ✓ IF THE TRACK WAS IN ATTENDANCE DURING THE SELECTION PERIOD	E. TOTAL APPROVED FREE IN TRACKS IN ATTENDANCE
	<u>TOTAL</u>			
	<u>TOTAL</u>			
	<u>TOTAL</u>			
	<u>TOTAL</u>			
	<u>TOTAL</u>			

INSTRUCTIONS FOR MULTI-TRACK YEAR ROUND SCHOOLS OPTIONAL FORM O-2a

Method 1. (Optional Form O-2a)

ACTUAL FREE APPROVED BY TRACK

Method 1 will only work in those situations where the same tracks are in attendance on every operating day of the month used to select the schools for review. This chart illustrates a four-track schedule where the same three tracks are in attendance during the period used to select the schools for review and the fourth track (Track B) is on vacation.

A. SCHOOL NAME	B. TRACK	C. NUMBER APPROVED FREE	D. ✓ IF THE TRACK WAS IN ATTENDANCE DURING THE SELECTION PERIOD	E. TOTAL APPROVED FREE IN TRACKS IN ATTENDANCE
Mill Grove Elementary	A	135	✓	135
	B	118		
	C	142	✓	142
	D	127	✓	127
<u>TOTAL</u>		522		404

- A. Enter the name of the school.
- B. Enter the track identifier such as a letter designation, e.g., A, B, C, etc., a numerical designation, e.g., 1, 2, 3, etc. or a name designation, e.g., Robins, Bluebirds, Sparrows, etc. Enter a designation for each of the tracks in the multi-track schedule.
- C. Enter the number of children approved for free meals in each track.
- D. Check [✓] the tracks that were in attendance during the period used to select schools for review.
- E. Enter the number of children approved for free meals in each track that was in attendance during the selection period. Total the numbers listed in Column E and enter on the TOTAL line and also on Optional Form O-2, SCHOOL SELECTION WORKSHEET, Column E.

Whenever possible, it is recommended that Method I. ACTUAL FREE APPROVED BY TRACK be used in the school selection process. Method I will provide the most accurate number of students approved for free meals to determine if the school meets the 97%, 87%, or 77% criteria described in the CRE Guidance and on the Instructions for the SCHOOL SELECTION WORKSHEET, Optional Form O-2.

MULTI-TRACK SCHOOL SELECTION WORKSHEET
ESTIMATED FREE APPROVED BY TRACK

A. NUMBER OF SERVING DAYS IN SELECTION PERIOD: _____		B. TRACK	C. NUMBER APPROVED FREE	D. NUMBER OF DAYS DURING THE SELECTION PERIOD THE TRACK WAS IN ATTENDANCE	E. TOTAL APPROVED FREE IN SELECTED TRACKS (D ÷ A) x C
SCHOOL NAME					
	<u>TOTAL</u>				
	<u>TOTAL</u>				
	<u>TOTAL</u>				
	<u>TOTAL</u>				
	<u>TOTAL</u>				

INSTRUCTIONS FOR MULTI-TRACK YEAR ROUND SCHOOLS OPTIONAL FORM O-2b

Method 2 (Optional Form O-2b)

ESTIMATED FREE BY TRACK

Method 2 should be used when all of the tracks are in attendance at some time during the period used to select the schools for review. For example, in a four-track schedule it is likely that two of the tracks will be scheduled for the entire selection period and the additional third of the students will be made up of students from both of the remaining tracks (Tracks B and C).

A. NUMBER OF SERVING DAYS IN SELECTION PERIOD: _____22_____ SCHOOL NAME	B. TRACK	C. NUMBER APPROVED FREE	D. NUMBER OF DAYS DURING THE SELECTION PERIOD THE TRACK WAS IN ATTENDANCE	E. TOTAL APPROVED FREE IN SELECTED TRACKS (D ÷ A) x C
Mill Grove Elementary	A	135	22	135
	B	118	15	81
	C	142	7	46
	D	127	22	127
	<u>TOTAL</u>	522		389

- A. Enter the number of serving days during the period used to select schools for review. In most cases, this will be the number of days shown as attendance days on the SFA's multi-track school calendar. Enter the name of the school. If the number of serving days for any individual school is different from the number of serving days listed under A, in the space below the school name, record the number of days during the selection period when that individual school provided lunches. For example, in some SFAs, elementary schools are not in session 1 day each month for a teacher workday, but the upper grades are in attendance. If that were the case in the example given above, the reviewer would record 21 next to the school's name, e.g., Brown Elementary – 21 days.
- B. Enter the track identifier such as a letter designation e.g., A, B, C, etc., a numerical designation e.g., 1, 2, 3, etc. or a name designation e.g., Robins, Bluebirds, Sparrows, etc. Enter a designation for each of the tracks in the multi-track schedule.
- C. Enter the total number of students approved for free meals for each of the tracks in the school, i.e., number approved free for all students with access to the NSLP.
- D. Enter the number of days during the selection period that each track was in session.
- E. Divide Column D by Column A and multiply by Column C. Round up to the nearest whole number and enter on Optional Form O-2, School Selection Worksheet, Column E.

Calculations should be made up to the last step without any rounding of fractional numbers. For the number approved free to enter into Columns E and onto the School Selection Worksheet, O-2, Column E, round any fractional amounts up to the next whole number. In all cases, this will give the school the benefit of the doubt when calculating the percent free participation for school selection.

In this example, for track B, Column D (15) divided by Column A (22) equals .6818 times Column C (118) equals 80.45. Round 80.45 up to 81.

[illegible]

INSTRUCTIONS FOR MULTI-TRACK YEAR ROUND SCHOOLS OPTIONAL FORM O-2c

Method 3 (Optional Form O-2c) **ESTIMATED FREE APPROVED**

Method 3 should be used when the number of students approved for free meals is not available by track, i.e., only the total number approved for all tracks combined can be obtained.

A. SCHOOL NAME	B. TOTAL NUMBER APPROVED FREE IN ALL TRACKS	C. NUMBER OF TRACKS IN THE MULTI- TRACK SCHEDULE	D. LARGEST NUMBER OF TRACKS IN ATTENDANCE ON ANY DAY DURING SELECTION PERIOD	E. ESTIMATED NUMBER APPROVED FOR FREE MEALS ($B \div C$) x D
Mill Grove Elementary	522	4	3	392

- A. Enter the name of the school.
- B. Enter the total number of students approved for free meals for all of the tracks in the school, i.e., the number approved free for all students with access to the NSLP.
- C. Enter the number of tracks in the multi-track schedule.
- D. Enter the largest number of tracks in attendance on any day during the selection period. (This will usually be one less than the total number of tracks in the multi-track schedule.)
- E. Divide Column B by Column C and multiply by Column D. Round up to the nearest whole number and enter in Column E and on Optional Form O-2, School Selection Worksheet, Column E

Calculations should be made up to the last step without any rounding of fractional numbers. For the number approved free to enter into Columns E and onto the School Selection Worksheet, O-2, Column E, round any fractional amounts up to the next whole number. In all cases, this will give the school the benefit of the doubt when calculating the percent free participation for school selection.

In this example, Column B (522) divided by Column C (4) equals 130.5 times Column D (3) equals 391.5. Round 391.5 up to 392.

LEA/SFA:							School:						
JULY							AUGUST						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
		1	2	3	4	5						1	2
6	7	8	9	10	11	12	3	4	5	6	7	8	9
13	14	15	16	17	18	19	10	11	12	13	14	15	16
20	21	22	23	24	25	26	17	18	19	20	21	22	23
27	28	29	30	31			24	25	26	27	28	29	30
							31						
OCTOBER							NOVEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
			1	2	3	4							1
5	6	7	8	9	10	11	2	3	4	5	6	7	8
12	13	14	15	16	17	18	9	10	11	12	13	14	15
19	20	21	22	23	24	25	16	17	18	19	20	21	22
26	27	28	29	30	31		23	24	25	26	27	28	29
							30						
JANUARY							FEBRUARY						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3							
4	5	6	7	8	9	10	1	2	3	4	5	6	7
11	12	13	14	15	16	17	8	9	10	11	12	13	14
18	19	20	21	22	23	24	15	16	17	18	19	20	21
25	26	27	28	29	30	31	22	23	24	25	26	27	28
APRIL							MAY						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
			1	2	3	4						1	2
5	6	7	8	9	10	11	3	4	5	6	7	8	9
12	13	14	15	16	17	18	10	11	12	13	14	15	16
19	20	21	22	23	24	25	17	18	19	20	21	22	23
26	27	28	29	30			24	25	26	27	28	29	30
							31						
SEPTEMBER							DECEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
	1	2	3	4	5	6		1	2	3	4	5	6
7	8	9	10	11	12	13	7	8	9	10	11	12	13
14	15	16	17	18	19	20	14	15	16	17	18	19	20
21	22	23	24	25	26	27	21	22	23	24	25	26	27
28	29	30					28	29	30	31			
MARCH							JUNE						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
								1	2	3	4	5	6
								7	8	9	10	11	12
								14	15	16	17	18	19
								21	22	23	24	25	26
								28	29	30			

[illegible]

**WORKSHEET TO DETERMINE CYCLE YEAR
PROVISION 2 S-1, QUESTION 1**

SFA:	SCHOOL:
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PROVISION 2 S-1, QUESTION 1

SCHOOL YEAR	CHECK [✓] BASE YEAR	YEAR
1979-1980		
1980-1981		
1981-1982		
1982-1983		
1983-1984		
1984-1985		
1985-1986		
1986-1987		
1987-1988		
1988-1989		
1989-1990		
1990-1991		
1991-1992		
1992-1993		
1993-1994		
1994-1995		
1995-1996		
1996-1997		
1997-1998		
Before 10-1-1998		

SCHOOL YEAR	CHECK [✓] BASE YEAR	YEAR (1 THRU 4)
On or After 10-1-1998		
1999-2000		
2000-2001		
2001-2002		
2002-2003		
2003-2004		
2004-2005		
2005-2006		
2006-2007		
2007-2008		
2008-2009		
2009-2010		
2010-2011		
2011-2012		
2012-2013		
2013-2014		
2014-2015		
2015-2016		
2016-2017		
2017-2018		
2018-2019		

INSTRUCTIONS FOR PROVISION 2 O-5

SAMPLE WORKSHEET TO DETERMINE CYCLE YEAR

PROVISION 2 S-1, QUESTION 1

SCHOOL YEAR	CHECK [✓] BASE YEAR	YEAR
1979-1980		
1980-1981		
1981-1982		
1982-1983		
1983-1984		
1984-1985		
1985-1986		
1986-1987		
1987-1988		
1988-1989		
1989-1990		
1990-1991		
1991-1992		
1992-1993		
1993-1994		
1994-1995		
1995-1996		
1996-1997		
1997-1998		
Before 10-1-1998		

SCHOOL YEAR	CHECK [✓] BASE YEAR	YEAR (1 THRU 4)
On or After 10-1-1998		
1999-2000		
2000-2001		
2001-2002	✓	1
2002-2003		2
2003-2004		3
2004-2005		4
2005-2006	Extension	1
2006-2007		2
2007-2008		3
2008-2009		4
2009-2010	Extension	1
2010-2011		2
2011-2012		3
2012-2013		4
2013-2014		1
2014-2015		2
2015-2016		3
2016-2017		4
2017-2018		1
2018-2019		2

For Provision 2 Schools:

- The earliest possible base year is 1979-1980.
- The Base Year is year 1 of the cycle.
- If the Base Year is between 1979-1980 and September 30, 1998, each cycle could have from 3 to 5 years before an extension is needed.
- If the school's Base Year or extension began on or after October 1, 1998, each cycle has 4 years.
- In this example, if the CRE was being conducted in School Year 2009-2010, Provision 2 S-1, Question 1 would be marked as:

Provision 2 Base Year [2001-2002]

Year 1[✓] 2[] 3[] 4[]

September 1, 2014

**WORKSHEET TO DETERMINE CYCLE YEAR
PROVISION 3 S-1, QUESTION 1**

SFA:	SCHOOL:
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SCHOOL YEAR	CHECK [✓] BASE YEAR	YEAR (1 THRU 4)
1993-1994		
1994-1995		
1995-1996		
1996-1997		
1997-1998		
1998-1999		
1999-2000		
2000-2001		
2001-2002		
2002-2003		
2003-2004		
2004-2005		
2005-2006		
2006-2007		
2007-2008		
2008-2009		
2009-2010		
2010-2011		
2011-2012		
2012-2013		
2013-2014		
2014-2015		
2015-2016		
2016-2017		
2017-2018		
2018-2019		

INSTRUCTIONS FOR PROVISION 3 O-5

SAMPLE WORKSHEET TO DETERMINE CYCLE YEAR

PROVISION 3 S-1, QUESTION 1

SCHOOL YEAR	CHECK [✓] BASE YEAR	YEAR (1 THRU 4)
1993-1994		
1994-1995		
1995-1996		
1996-1997		
1997-1998		
1998-1999	✓	
1999-2000		1
2000-2001		2
2001-2002		3
2002-2003		4
2003-2004	Extension	1
2004-2005		2
2005-2006		3
2006-2007		4
2007-2008	Extension	1
2008-2009		2
2009-2010		3
2010-2011		4
2011-2012		1
2012-2013		2
2013-2014		3
2014-2015		4
2015-2016		1
2016-2017		2
2017-2018		3
2018-2019		4

For Provision 3 Schools:

- The earliest possible base year is 1993-1994 for schools converting from Provision 2.
- School Year 1994-1995 is the earliest Base Year for new schools implementing Provision 3.
- The year after the Base Year is year 1 of the cycle.
- There have been four (4) years in each cycle since the beginning of the Provision.
- In this example, if the CRE was being conducted in School Year 2009-2010, Provision 3 S-1, Question 1 would be marked as:

Provision 3 Base Year [1998-1999]

Year 1[] 2[] 3[✓] 4[]

September 1, 2014